



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**(1) Petition for Substituted Judgment to Transfer Assets of the Conservatorship Estate to Irrevocable Trust, (2) First and Final Account and Report of Conservators of the Conservatorship Estate, (3) Petition for Approval and (4) Petition for Allowance of Attorney's Fees and Reimbursement of Costs, and for (5) Suspension of Further Accounting by the Conservatorship (Prob. C. 2580, 2620, 2640)**

<b>Age: 79</b>		<p><b>ROBB P. MYERS and LYNN MYERS</b>, Co-Conservators of the Estate, are Petitioners.</p> <p>Account period: <b>06/29/11 – 06/30/12</b></p> <p>Accounting - <b>\$47,428.12</b>  Beginning POH - <b>\$46,811.88</b>  Ending POH - <b>\$47,428.12</b></p> <p>Conservators - <b>waive</b></p> <p>Attorney - <b>\$6,706.25</b>  (per itemization for 10.8 attorney hours @ \$275.00/hr. and 17.75 paralegal hours @ 85.00/hr. for work done in establishing the conservatorship, obtaining bond, completion of the I &amp; A, and this Petition)</p> <p>Attorney - <b>\$800.00</b> (anticipated additional fees not to exceed \$800.00 for services to be rendered after the date of this Petition through the hearing on this Account)</p> <p>Attorney costs - <b>\$2,096.00</b> (For filing fees, investigation fees, bond fee, certified copies, probate referee. \$1,540.63 has already been paid, leaving a balance of \$555.37.)</p> <p><b>Petitioners state:</b></p> <p>1. The main purpose of establishing a conservatorship of the estate was to enable the conservators to deal with METLIFE so that proceeds from a METLIFE long term care policy could be obtained and used to pay for Conservatee's care. That purpose has been fulfilled and regular payments are being made for Conservatee's care directly to the conservatee's care facility.</p> <p>2. Subsequent to the Petitioner's filing their Petition for Appointment of Conservator of the Estate, Conservatee's husband filed a competing petition. The Conservatee's husband and Petitioners agreed to the appointment of Petitioners subject to the obligation that Petitioner's provide Conservatee's husband with periodic accountings in addition to the accountings required under the Probate Code.</p> <p style="text-align: center;">Continued on Page 2</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Inventory &amp; Appraisal filed 09/07/12 lists assets of the Conservatorship Estate in the amount of \$46,811.88 comprised of a vehicle, tangible personal property items and an annuity.</p> <p>1. Petitioners are requesting to transfer the assets of the Conservatorship Estate to the Conservatee's trust pursuant to Probate Code § 2580(b)(6) which allows "Transferring to a trust created by the conservator or conservatee any property unintentionally omitted from the trust." However, petitioners do not allege or make any statement that the conservatorship estate assets were unintentionally omitted. The Court may require further information.</p> <p>2. Petitioners request to dispense with the requirements of CRC 7.903; the court may require authority to dispense with such requirements.</p> <p>3. Need Order.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b> x		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 10/10/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 - Marx</b></p>	

3. On 06/27/96, Conservatee executed the RAE ANN MARX 1996 FAMILY TRUST (the "Trust"). The Trust was restated on 12/03/08. Conservatee is the sole income beneficiary of the Trust. As of 05/31/12, the Trust's assets totaled \$524,478.50.
4. Petitioners believe that given the small size and nature of the assets in the Conservatorship estate, it is in the best interest of the Conservatee to have all of her assets centralized in the Trust, which Conservatee created for her own benefit. This would centralize management of Conservatee's Estate, minimize accounting costs and any probate costs or time delays upon the death of the Conservatee. Taking this action would eliminate the need for providing Conservatee's husband with multiple accountings, thus providing additional savings for the Conservatee.
5. Petitioners seek an order under Probate Code § 2580(b)(6) allowing Conservators to transfer all assets shown on Schedule E to RONALD FAGAN, ROBB MYERS, CYNTHIA MYERS, MARK MYERS, and BRAD MYERS, as Trustees of THE RAE ANN MARX 1996 FAMILY TRUST UTD JUNE 27, 1996.
6. No further accountings should be required of Conservators if the Court authorizes transfer of the assets to the Trust as requested herein because there will be no further receipts or disbursements to or from the Conservatorship Estate. The Conservatorship Estate should remain open so Conservators can continue to interact with the insurance company making long-term care payments if necessary.
7. Good cause exists to dispense with the requirements of California Rule of Court 7.903(c) because this Trust was created many years before the Conservatorship proceedings were commenced, the Trust is managed by a group of Trustees and a majority of them must concur in any decision, the Trust waived the requirement of a bond, and modifying the Trust to comply with Rule 7.903 would cause unnecessary expense.

**Petitioner prays for an Order:**

1. Authorizing and directing the Conservators to transfer the assets of the Conservatorship Estate to RONALD FAGAN, ROBB MYERS, CYNTHIA MYERS, MARK S. MYERS, and BRAD MYERS, Trustees of THE RAE ANN MARX 1996 FAMILY TRUST UTD JUNE 27, 1996;
2. Authorizing the suspension of accounting by the Conservatorship;
3. That good cause exists to dispense with the requirements of California Rule of Court 7.903;
4. Requiring Trustees of THE RAE ANN MARX 1996 FAMILY TRUST UTD JUNE 27, 1996 provide accountings as agreed to the Conservatee's spouse;
5. Approving, allowing and settling the Account and Report of Conservators; and
6. Authorizing the attorney fees and costs.

**Second Amended First and Final Account and Report of Administrator; Petition for  
Its Settlement, for Ratification of Acts; for Allowance of Extraordinary Fees; for Final  
Distribution and for Discharge of Administrator**

<b>DOD: 06/01/11</b>		<b>SANDRA AVEDESIAN</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 09/18/12</b> <b>Minute Order from 09/18/12 states:</b> <b>Counsel advises the Court that she</b> <b>will be doing another re-evaluation.</b>  <b>As of 10/09/12, the following issues</b> <b>remain outstanding:</b>  1. Need Order.
		Account period: <b>08/08/11 – 08/20/12</b>	
		Accounting - <b>\$234,150.62</b>	
		Beginning POH - <b>\$226,340.47</b>	
		Ending POH - <b>\$195,868.47</b> (\$17,246.05 cash remaining after payment of final creditors claim)	
<b>Cont. from 09/18/12</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	08/08/11	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
		Administrator - <b>\$7,125.05</b> (statutory less payments made by the estate on behalf of the Administrator and distribution of the beneficial interest in a gun)	
		Administrator x/o - <b>\$1,000.00</b> (Per Local Rule for the sale of personal property)	
		Attorney - <b>\$7,428.29</b> (statutory)	
		Attorney x/o fees - <b>\$1,550.71</b> (per itemization for work performed for the benefit of the estate for selling estate assets and legal advice to administrator in liquidating estate assets)	
		Closing - <b>\$142.00</b>	
		<b>Distribution, pursuant to intestate succession, is to:</b>	
		Sandra Fay Avedisian-16.666% interest in a 50% interest in real property	
		Louise Avedisian - 16.666% interest in a 50% interest in real property	
		Thomas Avedisian - 16.666% interest in a 50% interest in real property	
		Sarah Avedisian - 4.166% interest in a 50% interest in real property	
		Stephanie Avedisian- 4.166% interest in a 50% interest in real property	
		Carla Avedisian - 4.166% interest in a 50% interest in real property	
		Crystal Avedisian - 4.166% interest in a 50% interest in real property	
		Harold Simonian - 16.666% interest in a 50% interest in real property	
		Jeffrey Simonian - 5.555% interest in a 50% interest in real property	
		Kristen Simonian - 5.555% interest in a 50% interest in real property	
		Jonathan Simonian - 5.555% interest in a 50% interest in real property	

Reviewed by: JF

Reviewed on: 10/10/12

Updates:

Recommendation:

File 4 - Avedisian

<b>DOD: 2-1-12</b>		<p><b>ROBERTA LOU ODAHL, Daughter, Co-Trustee and Trust beneficiary, is Petitioner and requests appointment as Special Administrator without bond and without IAEA for the specific purpose of appointing a Plan Administrator for a Money Purchase Keogh held at Fidelity Investments to facilitate the distribution of funds to the named beneficiaries.</b></p> <p>Petitioner states the Decedent was the Plan Administrator for a Money Purchase Keogh. A beneficiary designation is on file; however, Fidelity Investments is unable to release the funds to the named beneficiaries until a Plan Administrator is appointed under their rules, as no suitable Plan Administrator was named.</p> <p>Fidelity Investments refused to recognize a §13100 Affidavit to allow Petitioner to exercise the right to appoint a successor Plan Administrator of the Keogh Plan and requires the appointment of a personal representative to exercise the right to appoint a successor Plan Administrator.</p> <p>Once a Plan Administrator is appointed, the assets in the account will pass to the named beneficiaries. This requires immediate attention to allow the collection and distribution of the Keogh Plan to the designated beneficiaries to avoid adverse income tax consequences.</p> <p>Petitioner also requests that due to the fact there will be no probate proceeding, the Court order payment of attorney's fees incurred in this proceeding by the trust pursuant to the attached fee agreement.</p> <p>Petitioner states that the trust permits one co-trustee acting alone to take such actions; therefore, Petitioner Roberta K. Odahl is the only co-trustee signing the Agreement Assuming Liability; however, the other co-trustee, Diane Patricia Barnett, has been provided with notice of this petition.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> Petitioner has not designated a time frame for the Special Administration. The Court may require clarification to set an expiration date.</p>	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			W
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 10-10-12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5 - Knowlton</b></p>		

Atty

Bacon, Tara (Pro Per – Mother – Petitioner)

Atty

Wall, Peter J. (for Joan Black – Paternal Grandmother – Guardian)

## Petition for Termination of Guardianship

Age: 8		<p><b>TARA BACON</b>, Mother, is Petitioner.</p> <p><b>JOAN BLACK</b>, Paternal Grandmother, was appointed Guardian on 1-5-10.</p> <p>Father: <b>DANNY BLACK</b> Paternal Grandfather: Deceased Maternal Grandparents: Deceased</p> <p><b>Petitioner states</b> she has her own apartment – a very nice two bedroom in a good area. She has a very good job working for the public authorities and is in the health care union. She attends church at Harmony Free and will take her son with her. Jerry Dyer also attends church there. Her son stays nights with her often and she takes him to school and picks him up. He tells her he wants to be with her and she can't wait for the day he returns home for good. Mother states she has had her own apartment since December 2011. The guardian promised that she would return Jason before second grade began, but second grade is now over. It hurts her to see her son being hurt by the situation. Petitioner asks the court to please end the guardianship so that she and her son can be complete and settled together in one stable home.</p> <p><b>Court Investigator Jo Ann Morris filed a report on 8-27-12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 9-4-12.</u></p> <p>Petitioner filed a Declaration on 9-21-12 regarding the Court Investigator's report. See Declaration.</p> <p><u>As of 10-9-12, the following issues remain:</u></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §1460(b)(5) on: <ul style="list-style-type: none"> <li>- Joan Black (Guardian)</li> <li>- Danny Black (Father)</li> </ul> </li> </ol> <p><b>Note:</b> Petitioner filed a "Proof of Service – Civil" but it is incomplete – it does not state the hearing date, what documents were served, and does not provide info about the server.</p>
090412			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 10-9-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Black</p>	

## (1) Waiver of Accounting and (2) Petition for Final Distribution

<b>DOD: 6-28-10</b>		<b>CINDY L. WALL</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<u>Minute Order 4-16-12: Examiner Notes provided to Petitioner. Petitioner is directed to cure the defects.</u>
		Accounting is waived.	<u>As of 10-10-12, nothing further has been filed. The following issues remain:</u>
	Aff.Sub.Wit.	I&A: \$174,360.50	
✓	Verified	POH: \$174,360.50	
✓	Inventory	(\$4,360.50 cash plus real property)	
✓	PTC	Executor: Waived	
✓	Not.Cred.		
N/A	Notice of Hrg	<b>Distribution pursuant to Decedent's will:</b>	
N/A	Aff.Mail	Cindy L. Wall: Entire estate	<b>If notice was required, but not given, the matter may require continuance for the appropriate time for response.</b>
	Aff.Pub.	(\$4,360.50 cash plus real property)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	1. <b>Petitioner does not address whether notice was given to the Director of Health Care Services pursuant to Probate Code §9202(a).</b>
	Aff. Posting		<b>If notice was required, but not given, the matter may require continuance for the appropriate time for response.</b>
	Status Rpt		2. <b>Need Order.</b>
	UCCJEA		9202(a). Not later than 90 days after the date letters are first issued to a general personal representative, the general personal representative or estate attorney shall give the Director of Health Care Services notice of the decedent's death in the manner provided in Section 215 <u>if the general personal representative knows or has reason to believe that the decedent received health care under Chapter 7 (commencing with Section 14000) or Chapter 8 (commencing with Section 14200) of Part 3 of Division 9 of the Welfare and Institutions Code, or was the surviving spouse of a person who received that health care.</u> The director has four months after notice is given in which to file a claim.
	Citation		<b>Reviewed by: skc</b>
	FTB Notice		<b>Reviewed on: 10-10-12</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 15 - Wedel</b>

Age: 9	<b><u>TEMPORARY EXPIRES 10/16/12</u></b>	NEEDS/PROBLEMS/COMMENTS:  <b><u>CONTINUED FROM 09/04/12</u></b> Minute Order from 09/04/12 states: Examiner notes are provided to the Petitioner. The Petitioner is directed to cure defects. Matter continued to 10/16/12. The temporary is extended to 10/16/12.
	SARAH HARRISON, sister, is Petitioner.	
	Father: <b>GARY SMALZ</b> - deceased	
Cont. from 090412	Mother: <b>LAURA SMALZ</b> – deceased	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: ANDREW SMALZ - deceased	
<input checked="" type="checkbox"/> Verified	Paternal grandmother: MARILYN ROOT – <b>served by mail on 09/04/12</b>	
<input type="checkbox"/> Inventory	Maternal grandfather: DARVIN PITTMAN - deceased	
<input type="checkbox"/> PTC	Maternal grandmother: JACQUE PRISCO – <b>served by mail on 09/04/12</b>	
<input type="checkbox"/> Not.Cred.	Siblings: GARY LEE SMALZ, ROXANNE SMALZ – <b>both served by mail on 09/04/12</b>	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states that the minor's parents are deceased and that it was her parents wish that she serve as custodian of the minor.	
<input checked="" type="checkbox"/> Aff.Mail	Court Investigator Dina Calvillo filed a report on 08/27/12.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv. n/a		
<input checked="" type="checkbox"/> Conf. Screen		Reviewed by: JF
<input checked="" type="checkbox"/> Letters		Reviewed on: 10/09/12
<input checked="" type="checkbox"/> Duties/Supp		Updates:
<input type="checkbox"/> Objections		Recommendation:
<input type="checkbox"/> Video Receipt		File 13 – Smalz
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		



14 Estrella Angel Reyna Cisneros (GUARD/P)

Case No. 12CEPR00713

Atty Ramos, Isidro (Pro Per – Petitioner – Maternal Uncle)

Atty Gonzales, Agapita P (Pro Per – Petitioner – Maternal Aunt)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

<b>Age: 1 year</b>		<b>TEMPORARY EXPIRES 10-16-12</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>ISIDRO RAMOS and AGAPITA GONZALES,</b> maternal uncle and aunt, are petitioners.	
		Father: <b>JESUS ALBERTO REYNA CISNEROS</b> - Declaration of Due Diligence filed 08/16/2012, Notice dispensed 8-28-12	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	ww	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>		
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>Clearances</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
Mother: <b>VERONICA RAMOS</b> , consents and waives notice.			
Paternal Grandfather: Unknown			
Paternal Grandmother: Elvira Reyna Cisneros, Served by mail 8-18-12			
Maternal Grandfather: Isidro Ramos, Declaration of Due Diligence filed 08/14/2012			
Maternal Grandmother: Louisa Velasco, consents and waives notice			
<b>Petitioner states:</b> child has down syndrome and guardianship is needed to get the child enrolled with CVRC for services. Mother is under the influence most of the time and not in the right state of mind to care for the child. Child had open heart surgery in December 2011 and her follow up appointments were missed with the Neurologist and Cardiologist.			
<b>Court Investigator Dina Calvillo filed a report 10-4-12.</b>			
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 10-10-12			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 14 - Cisneros</b>			